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ABSTRACT

Education is one of the major problems connected with the economic and social distribution of the total resources of the world. Examples of the educational gap between rich and poor countries can be seen by statistical comparisons between Peru and Czechoslovakia and between Guatemala and Denmark which show how unevenly educational resources are distributed throughout the world. The term "socioeconomy" deals not only with economic values but also with the welfare of the individual. Like education, socioeconomic status depends on the social distribution of resources. The goals for adult education to work in a politically distributive way are as follow: (1) to reach those who lack education or have a bad education, and (2) to raise the socioeconomic status and improve the conditions of life for individuals. Socioeconomic obstacles to prevent the fulfillment of these goals are inherent in demographic and social structure. For adult education to overcome these obstacles it must satisfy criteria on both societal and individualistic levels. In Portugal various regions have different socioeconomic structures which must be studied through interviews, statistical descriptions, and analysis before the proper form of adult education can be recommended for them. (This paper is the first in a series resulting from research conducted on Portugal by Sweden under a cooperative agreement between the two governments.) (ELG)

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THE PORTUGAL PROJECT

Adult education in a socio-economic perspective

Paper for the course

"Curso sobre Educação de Adultos"

Thord Erasmie

mars 1978

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LINKÖPING UNIVERSITY
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THE PORTUGAL PROJECT

A short description

Background

After the Portuguese revolution in 1974 the Swedish parliament decided that Portugal should receive certain aid in order to assist its development towards democracy. This aid was to be channelled through SIDA (the Swedish International Development Authority). In negotiations between SIDA and Portugal mainly three areas for cooperation were singled out, housing, cooperatives and education. Some 6 million Sw. crowns were allocated to education for the last two fiscal years. Out of this the Portuguese authorities were anxious to have a substantial amount set off for adult education. One important problem in this context is the fact that Portugal has very little experience in the field, while the needs for adult education are great and urgent. Only to mention one example, at least 30% of the population above 14 years of age are considered to be functional illiterates.

Various Swedish missions were sent down to study the situation and to discuss programmes with the Portuguese authorities. During the academic year 1977/78 agreements were reached with DGEP, the central authority in Lisbon responsible for ad.ed., and with the Universities of Minho and Évora regarding programmes for the current project. These programmes envisage assistance mainly within three different fields: Awareness-Information, Teacher Training, Research.

The Linköping University staff involved in activities in Portugal consists of the following: Thord Erasmie, Ph.D., adviser and supervisor of research activities, works in Portugal for limited periods. Johan Norbeck, M.A., adviser on methods and organization, stationed in Portugal from January 1978. Harald Vallgård, M.A., adviser on administration and methods, stationed in Portugal from January 1979. For ad hoc tasks other specialists are sent down.

Activities

From June 1978 DGEP is gradually designing the realization of a national programme. Our project staff is giving advice on research and training. It is taking an active part in the planning and execution of training courses for central staff, coordinators and teachers in the field. It also carries out some limited descriptive research on its own.

The two universities in Minho and Évora have started by giving awareness-information courses. Research as well as training courses for certain categories of teachers are being planned. The project staff is involved in all three activities both as advisers and lecturers.

The research planned is mainly descriptive, trying to find needs and resources in the field but also factors which may favour or hamper adult education.

A second part of the project is the activities carried out in Sweden. They include training of staff from the universities of Minho and Évora. They also include collecting information on Portugal and giving service to other ad.ed. institutions. The data collected in the research in Portugal will also be treated in computers at the Linköping University. In Sweden an assistant, Folke Dubel?, M.A., is doing this work together with Thord Erasmie and secretarial staff.

ADULT EDUCATION IN A SOCIO-ECONOMIC PERSPECTIVE

Introduction

Society disposes of a certain amount of human and material resources. How these resources are to be used depends on how we choose to answer the following questions.

1. How large a proportion of all our social resources are to be invested in education?
2. How are the resources invested in education to be distributed among the members of society?
3. How are the resources invested in education to be used, in what way and with which content?

In order to answer these questions, economic and social criteria may be used (1). I will return to these criteria further on.

Is it possible to formulate general objectives for adult education? From a distributive point of view the following general objectives may be stated:

1. Adult education ought to diminish the gaps in education in society. Thus it will further an increased equality and social justice.
2. Adult education ought to create opportunities for the continued existence and further development of democracy. It is supposed to increase the social and cultural consciousness of the citizen and thus create an understanding of and an active contribution to social change.
3. Adult education should effectively contribute to the furthering of progress in economy. Adult education should thus provide the labour market with a well educated labour as well as contribute to full employment.
4. On a long-term-basis adult education should work for a fair distribution of economic and social resources. Adult education is a prerequisite of a new international economic order (2).

In the objects described above economic and social components are included. These components are interrelated in one direction; that is a high social standard presupposes a high economic standard. On the other hand a high economic standard does not necessarily provide a high social standard.

Economics of education

The concept of economics of education signifies that education is viewed in relation to the profits in national economy directly or indirectly yielded by education. Educational policy is supposed to be based on economic premisses with cost estimates for profit or loss performed with respect to the results. Most industrial countries do not invest in adult education unless they are sure to get fairly prompt dividends in the form of increased productiveness which will lead to an increased gross national product. Thus all education is governed by social claims and ideologies and to a very minor extent by the needs of the individual. Of course, it is not easy to distinguish between individual and social needs. By the way the needs of society are hammered home with the aid

of all the communicative facilities of an industrial society, the individual is influenced to adopt an ideology which actually is not his but rather that of society. The individual's own potential needs for education may be satisfied only when they coincide with those of society. This state of affairs is not necessarily a disadvantage. It implies that society directs its resources towards political and economic goals which may at the same time favour the individual. (3)

The reasoning above which is based on a so-called cost-benefit-analysis has great limitations. If the costs for a product are related to its practical use or to its effect we have to work with quantities possible to describe in figures. If we want to describe adult education in terms of values like democracy, justice and equality, the cost-benefit-analysis will be of no use. In basic economy four productive factors may be included in a cost-benefit-analysis, namely natural resources, labour, real capital, and know-how. Even if there is a high correlation between the gross national product and the educational level in a country, this does not necessarily imply that the planning of education should follow the mechanical laws applied in a cost-benefit-analysis. The relationship between the applicability and the cost-benefit-analysis in the planning of education is such, that the further developed educational system a country has, the less applicable are the cost-benefit-techniques. (4)

In order further to explain this relationship I want to discuss two concepts within educational technology, namely the demand-for-places approach and the need-of-manpower approach. According to the former, the intake of students, that is the individual demand-for-places, determines the framing of the educational system. According to the latter approach, the dimensioning of the educational system is primarily based on social needs (e.g. those of the labour market). As it is difficult to predict the fluctuations in the labour market, especially according to the second approach, educational forecasts tend to be slightly misleading. It may seem contradictory, but in spite of sophisticated methods like computational technology, it will be easier to predict the need for education in a developing country on a comparatively primitive basis. To this must be added the complicated interplay of political values in which equality claims must be matched with purely utilitarian claims.

Examples of the relationship between education and economy

In order to illustrate the relationship between education and economy from an international point of view I would like to render a chapter from a book on the distributional problems of education written by me in 1977. (5)

The great losers

UNESCO publishes a statistical yearbook in which the actual state of education and culture are described in cold figures. I have looked through two of those printed in 1974 and 1975 respectively. (6)

At the moment of writing we have arrived at 1977 and thus I ought to have used the most recent statistical information. Unfortunately I have not been able to obtain any yearbook printed in 1976 or 1977. At the National Library of Psychology and Education they do not know of any yearbook being published after the edition from 1975. Be that as it may. The state of the world has not changed for the better with respect to education and culture so the information I will provide in the following will, with all the reservations usually holding for statistics, yield a reasonably accurate picture of the world education at the end of the seventies. To the extent that changes have taken place since 1974, when the information of the UNESCO yearbook was gathered, the changes have been in a negative direction.

As the whole world has obtained a lower standard of living in 1975 according to the statistics of the World Bank (published in December 1976), it might seem illogical if education and culture have developed in the opposite direction (i.e. compared to the economic development).

The economists of the World Bank were able to state that the welfare, expressed in terms of gross national product i.e. the total value of goods and services for the world's most indigent countries is still the same as in 1970. There has not been any improvement for these countries. 26 states displayed a gross national product per capita of less than 880 crowns. Corresponding figures for the United States and Sweden are 31 000 and 34 700 Sw crowns respectively.

The most indigent countries of the earth are, according to the statistics of the World Bank, Bhutan (300 Sw crowns/capita), The Upper Volta, Mali and Ruanda (all with 400 Sw crowns/capita), and Somalia, Ethiopia, Burundi and Bangladesh (440-480 Sw crowns/capita).

In my study of linguistic ability in various social groups presented in 1975 (7) I referred to winners and losers in the closing chapter. In that context the linguistic usage was correct. From an international point of view the concepts of winner and loser have quite a different meaning. The ultimate losers will be the indigent countries of the earth. The gap between poor and rich has widened during the last years which as far as education is concerned implies that while another thousand Sw crowns could be invested in a student each year in this country, the Upper Volta must cut down the contributions to each student with ten crowns, because of famine and drought, to a standard which in fact means that they do not have any money at all for the basic training.

Growth of population and educational opportunities

Education costs money. It is a trivial statement but nevertheless true. In countries where there is a high proportion of children and young people, the costs per capita will be greater than in industrial countries where this proportion is low. In industrial countries there is a very low growth of population and a low proportion of children and young people while the opposite is the case in the developing countries. In the table below changes in growth of population are shown totally and in the age groups 0 - 24 years for industrial and developing countries.

Thus we have now arrived at the conclusion a) that the proportion of children and young people is higher in the developing countries and b) that the proportion increases more in developing countries than in industrial countries. This state of affairs leads to a difficult economic charge on the developing countries. To register the costs for education and relate them to some dimension like gross national product is a very difficult thing. UNESCO tried to do this tour de force in their educational statistics.

Increase or decrease in population in percentage terms during the years 1970-1975

All age groups	Industrial countries	Developing countries
All age groups	1.0	2.5
0 - 4 years	1.6	2.1
5 - 9 years	-0.5	3.0
10 - 14 years	0.1	1.7
15 - 19 years	0.7	2.5
20 - 24 years	1.5	3.2

(8)

Now, these figures might easily be deceptive as states with centralized government or a planned economy will report a lower proportion of the gross national product invested in education than states with mixed economy or a Capitalist system. To reduce this deception somewhat, I would like to describe, by means of a table below how education actually charges the social economy in different countries. The quota used, has been calculated according to the following formula:

The quota of charge = $\frac{\text{the costs for education expressed in percentage of gross national product}}{\text{costs for education expressed in percentage of public (national, federal and/or local) expences}}$

The higher the quota the higher the charge on national economy. This quota is obviously a rough estimate but it may still serve as an illustration of the relation between economic charge and education.

With the reservations I made before as for the accuracy of the figures, the trend is quite clear. The education in Ethiopia charges society three times more than in Sweden. In Sweden all children go to elementary school. In Ethiopia slightly more than 40 per cent of all children go to primary school (the equivalent to our lower level). The number of pupils on higher levels in Ethiopia (which in this context will represent the indigent countries) is lower than 25 per cent.

Economic charge and the extent of basic education in a number of wealthy and a number of indigent countries

Territory	Quota of charge
Indigent countries:	
Ethiopia	7.0
Egypt	4.0
Senegal	4.1
Tunisia	4.0
Peru	5.3
India	6.7
Nepal	10.5

Territory	Quota of charge
Wealthy countries:	
Sweden	2.0
England	2.3
Norway	2.1
Soviet	1.8
U.S.A.	2.5

Note: the figures are taken from the years 1965-1972

The number of illiterates on the earth increases both in a relative and in an absolute sense. This is happening while education in countries like Sweden, the U S and Western Germany costs between 6000 and 20 000 Sw crowns per student and year. On the whole, the costs for education require an increasingly large share of the gross national product in industrial as well as in developing countries. But the overall economic charge on the developing countries will be many times greater than in the industrial countries.

Describing the educational problems of the developing countries is simple if we want to pile up facts which all unambiguously show how the industrial countries can keep or increase their high educational standard while the developing countries will have to invest an increasingly large portion of the economic total resources in order at least to keep the educational attainment level at the level of 1970.

The relationship between educational attainment level and living standard is quite clear. In the sixties Friedrich Edding (who works with international education at the Max Planck Institute in Berlin) made a study of the relationship between gross national product per head of population and the number of school years in a great number of countries. The correlation was almost complete ($r=0.9$).

According to Husén (9) the results may be interpreted in at least three different ways. (i) High education contributes to increased welfare, that is a high gross national product. (ii) A high gross national product provides opportunities for an advanced educational system. (iii) Both education attainment level and gross national product are due to underlying and more complicated factors like political system and ideological foundations.

At the end of the sixties the economist Philip H Coombs wrote his book *The World Educational Crisis* (10). Coombs was able to show in statistic figures how the gap between rich and poor countries was widening and how badly planned education was in general. Coombs' book served as an alarm clock and educationists all over the Western World discussed the causes of the crisis and made proposals for solutions. Coombs' discussion of possible solutions is, however, of little relevance today, ten years later. During the sixties it was possible to confine a problem, like Coombs did, to concern only education. But with this confinement the number of variables, needed to be manipulated, was comparatively limited and possible solutions could be drawn up - solutions which were all based upon technical innovations or technical aids.

Educational satellites were supposed to circle over Africa and transmit programs for millions of illiterate people. Teaching machines were to reduce the costs for teacher's salary. A strong control of the educational system in order to create an equilibrium between input and output was also expected to contribute to the solution of the crisis.

Now, ten years later, we know that there are no such simple solutions. The global education cannot be solved by means of particular measures. Education is part of the major problems connected with the economic and social distribution of the total resources of the world.

Peru and Czechoslovakia, Denmark and Guatemala. A few comparisons

My way of trying to keep in touch with the reader may seem unsophisticated. In the colporteur literature of the nineteenth century there was an animated dialogue between reader and author. I can see that I tend to adopt that style. I must ask for the reader's indulgence but it so happens that when I write I have a partner in front of me - a partner making comments, finding faults, giving tips and asking questions. I write this now for the reason that the preceding chapter became too much for me. It became too much not because there was a lack of documentation. On the contrary, the documentation on education is rich. No, I rather felt that it was too much either to have to support my arguments about uneven distribution and exploitation with a great number of figures or else start out from the premise that facts are known and instead formulate analyses - perhaps in terms of slogans. And then there is always the risk that my words will not penetrate.

Having been a teacher for almost twentyfive years, I have learnt that an educational message must be strictly defined and exemplified if it is to be trustworthy. I thus believe that a few comparisons of educational standard in four countries representing different economic levels and different political systems may illustrate the global injustice in education better than any universal surveys.

I have chosen to compare the industrial countries Denmark and Czechoslovakia with the very much poorer Guatemala in Central America and Peru in South America.

The countries thus matched together have approximately the same population, which is the reason why I have selected those very four.

The four countries represent different political and economic systems. Denmark is a democracy of western design with a so-called mixed economy. Czechoslovakia has a state-controlled planned economy. Peru is since a few years governed by a military junta with a Socialist strain. The principles of the economic system of Peru are not well defined. Both Communism and Capitalism are fought. In Peru the Socialism is called "desarrolismo" (evolutionism). Guatemala has a Capitalist economic system where multinational enterprises and the United States are important interested parties. According to Western democratic nomenclature the four countries are to be found on a scale ranging from democratic pluralism (Denmark) to a corrupt totalitarian state (Guatemala). The two couples Peru-Czechoslovakia and Guatemala-Denmark are different from each other in all respects except that there are in each couple the same number of persons to educate.

In the following table with characteristic features for the two couples there are figures illustrating the great difference between industrial and developing countries.

In the survey below a variety of facts concerning the two couples is provided

	Peru	Czechoslovakia	Guatemala	Denmark
Population ¹	14,9 milj	14,6 milj	5,5 milj	5,1 milj
GNP in US \$ ¹ (100)	7 960 439	52 063 043	1 893 090	22 872 300
GNP/capita ¹ in US \$	534	3571	351	4551
Total expenditure ¹ on educ in US \$ (1000)	326 378	2 394 900	41 648	1 601 061
Expenditure/capita ¹ on education	23	164	8	319
Proportion of illiterates aged 25 years	43 % ²	0.6 ³	69 ⁴	5
Students at colleges and universities	138 935 ⁶	127 957 ⁶	19 408 ⁶	96 408 ⁶
Students pro 1000 inhabitants	9.5	8.8	3.6	19.3
Students pro teachers	11.6	6.3	15.7	9.2
Expenditure for Research & Development in US \$ (100)	25 443 ⁷	2 222 079 ⁸	243 ⁹	1 169 962 ⁷
Expenditure for R&D pro inhabitant in US \$	1.70 ⁷	152.70 ⁸	0.05 ⁹	33.82 ⁷
Paper consumption per ¹⁰ inhabitant (kilogram), annually	1.8	11.2	0.7	24.5
Bookproduction. Number of titles, annually	943 ¹¹	8567 ¹¹	166 ¹²	6500 ¹¹

Notes: 1. 1972; 2. 1961; 3. 1970; 4. 1964; 5. Figures missing
6. 1972; 7. 1970; 8. 1973; 9. 1972; 10. 1973; 11. 1973; 12. 1972;

And yet the developing countries do not belong to the most indigent countries but belong in economic respects to the lower middle class of the world.

Similarly neither Denmark nor Czechoslovakia belong to the richest countries in the world. Denmark is numbered among the fifteen richest countries of the world and Czechoslovakia belongs to our lower upper class in economic respects.

The figures of the table show quantitative facts. On the other hand we know nothing of the quality of the education. The figures only reveal to some extent, the distribution of resources. It may thus seem impressive with the great number of students in Peru. Seeing what high a proportion of the adult population is illiterate one realizes that the educational resources are unevenly distributed.

Making some allowance for all the possible inaccuracies in the statistical material which is taken from UNESCO for each nation respectively, the table, however, shows the enormous gap in education between rich and poor countries. The table illustrates the thesis "education is for the wealthy".

Portugal - economy - education

The conditions of Portugal, with respect to the variables displayed in the table of data in the preceding chapter, will be reported below. Like all statistical reports it suffers from great shortcomings. The statistics date from different years. Practically all statistical information in the Statistical Yearbook 1975 dates back to the time just before the revolution in 1974.

Economy - education. Portugal

Population	8.74 milj (1974)
GNP in US \$ (00)	11 820 346
GNP/capita in US \$	1352
Total expenditure on education	6 101 954 (000) escudo 248 227 (000) US \$
Expenditure on education pro inhabitant	698 Escudo 28 US \$
Proportion of illiterates ¹⁾ aged 25 years	Figure missing
Students at colleges and universities	59 845 (1973)
Students pro 1000 inhabitants	6.8 (1973)
Students pro teachers	14.2 (1973)
Expenditure for Research & development in US \$	347 468 (00)
Expenditure for R&D pro inhabitant in US \$	3.9
Paper consumption pro inhabitant (kilogram), annually	4.3 kilogram
Bookproduction. Number of titles, annually	7 326 (1974)

1) According to information given by under-secretary of State in Ministry of education (Sept 1977) the proportion of illiterates of the adult population is about 30 %

What is socioeconomy?

The concept of economy may be defined in quantitative terms as gross national product average income etc. The concept socioeconomy contains, apart from economic values, values which concern the welfare or the social position of the individual.

In recent research the concept socioeconomy has often been replaced by welfare. The Finnish sociologist Allardt (11) makes use of a system of concepts where he distinguishes between living standard and quality of life. The model is illustrated in the fourfold table below.

	Welfare	Happiness
Standard of living	1. Needs, the satisfaction of which is defined in terms of material resources	3. Subjective sensations and experiences of one's material conditions of living
Quality of life	2. Needs, the satisfaction of which is defined in terms of relations to people, to society and to nature	4. Subjective sensations and experiences of relations to people, society and nature

The three dimensions of welfare are described in terms of

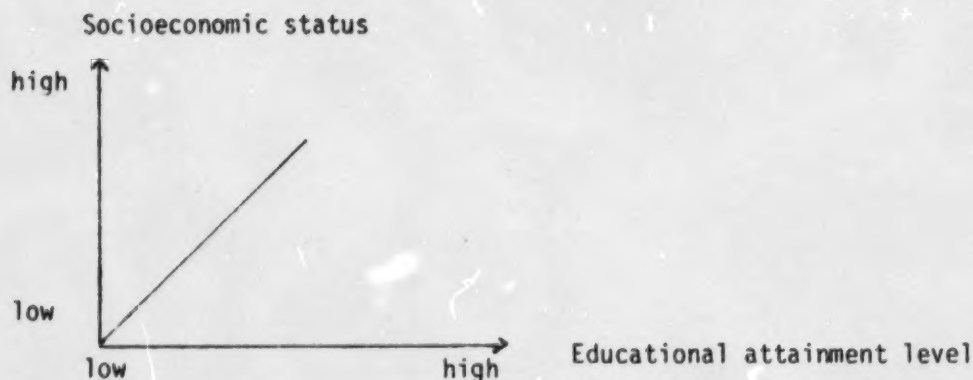
- .. having
- .. loving
- .. being

The concepts include a variety of components described below

<u>Having</u>	.. Income .. Housing standard .. Employment .. Education .. Health	} Standard of living
<u>Loving</u>	.. Local solidarity .. Family ties .. Ties of friendship	
<u>Being</u>	.. Reputation .. Political resources .. Personal status	

The elements included in the standard of living are strongly correlated (e.g. income/housing standard/education). The relations between standard of living and quality of life are not unambiguous.

The traditional socioeconomic grouping in classes or groups contains a variety of shortcomings. The concept social class is connected with political and economic conditions like political power and ownership to or disposition of the means of production. The concept social group has primarily been defined in terms of education and economy in Western Europe and the United States. Social class or social group should, in my opinion, be used only when the concepts are clearly defined and when the different social classes or groups have clear characteristics. Irrespective of whether we use the concept of welfare or the division into social groups we will find a simple and unambiguous correlation between socioeconomic status and educational attainment level which is shown in the figure below.



The figure above describes the relationship between education and socioeconomy. It does not, however, tell which is the dependent and which is the independent variable. The interaction between education and socioeconomy can be illustrated by the following questions:

- (i) Does a good education provide a high socioeconomic status?
- (ii) Does a high socioeconomic status provide a good education?

It is impossible to answer these questions unambiguously. But as education as well as socioeconomic status depend on the social distribution of resources, the primary task in order to improve adult education in a country is to transfer money and know-how to the groups who are worst off. Unless the aspect of distribution is considered, the existing differences in socioeconomic and education will increase rather than decrease.

The prerequisites for adult education to work in a politically distributive way (that is to create a more equal society with respect to economic and social resources) are:

Adult education must get to those who lack education or have a bad education

The effects of adult education must be such that those who have a low socioeconomic status will get a higher one

The theses above are absolute. One of the most serious problems within adult education has been that the wrong people have benefitted from the investments in education. The second problem has concerned the content of adult education. Unless adult education provides knowledge that can be used to improve conditions of life, the prevailing relations of power will be reproduced.

Adult education is one of many instruments to achieve a greater degree of quality in society. Equality in opportunities is an expression frequently used after the second world war in the discussion on educational policy. The English historian Towney has compared it to "the impudent politeness of an invitation to unwelcome guests issued in full assurance that the guests will be prevented by circumstances to accept".

The concept of equality may be conceived in different ways, due to which political ideology we represent.

The Conservative view implies that one believes in genetic rule. This means that each human being has innate negative and positive features which will develop with a deterministic relentlessness. In the typical Conservative view it is implicit that each human being should be satisfied with his/her fate and that the poor actually have got what they deserve. Hardly any Conservative party ventures to launch this view openly. They prefer to talk about that "the talents must be attended to" and that "school must not become equal to the extent that the students who are doing well will be handicapped". The more modest Conservatives use other phrases.

The Conservative view on equality is based upon the type of theory which Arthur Jensen, (12) among others, tries to defend, namely that man is governed by genetic factors and the influence of the environment is inconsiderable. (See the preceding chapter.)

The purely Liberal view on equality proceeds from the idea that school should be equal for all individuals and that social obstacles should be cleared away. Each individual should be treated equally. The idea of equality in education can be traced back to the Period of Enlightenment with Rousseau as one of its foremost instigators. In the Declaration of Independence of the United States from 1776, equal rights to education are also declared. The Liberal conception based upon equality for everyone when starting one's education, has a certain likeness with the views held in Conservative circles. If the student does not succeed now when he has got the opportunities, the school is no longer to blame but it is his own fault.

The Liberal idea of equality has many variations. The modern Swedish variation is based upon the doctrine that equality at school can be obtained by providing as much support and help as possible to students who are socially and economically deprived. On the other hand, Liberalism does not approve of too strong a control from the state to achieve this equality.

The Social Democratic view on equality in education agrees to some extent with the Liberal view. However, their conception is that society should interfere and direct us towards increased equality. This can take place by means of allocation of quotas to higher education (so that the working class will get a more equitable representation) or by measures outside of school.

The greatest difference between the Marxist Revolutionary view and the Social Democratic view on equality in education is that the Social Democrats, by continuous reforms, and gradually, in a long term process, want to reach the same goal as that which the Socialist revolutionaries want to achieve quickly.

The deepest gap between the Social Democrat and the Revolutionary view on equality lies in their different premisses. The Revolutionary Socialists do not consider that equality can be obtained in a society with a Capitalist or mixed economy structure.

In his recently published book on equality and education Torsten Husén has focused on an interesting aspect of the problem of equality. Husén's question is whether the efforts to obtain equality in the Swedish school system may contribute to an increased meritocracy and thus increase the gulf between winners and losers in the long run.

The argumentation is the following. Since we know that school achievements are strongly correlated to home variables and since school is norm related, (that is: school looks more to relative than to absolute competence), this will contribute to increase individual differences in school achievement.

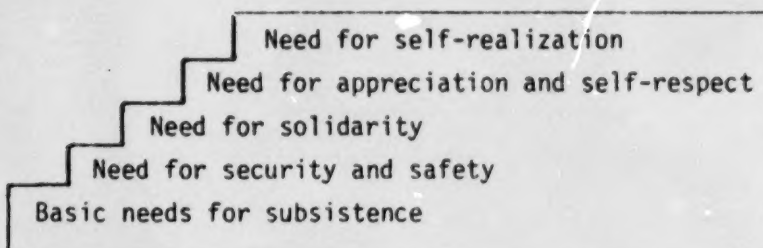
Inequality is, as it were, inherent in the system. In Daniel Bell's study of the postindustrial society similar apprehensions are brought forward. (13) The apparent zeal to create equality from the start of school while still maintaining mechanisms which create inequality in the educational system will according to Bell, result in a pronounced meritocracy.

Bell has, among other things, found out that Communist states like Soviet and Eastern Germany have a socially biased recruitment to higher education. This bias does not have the same cause as the biased recruitment in Western Europe but rather is connected with meritocratic criteria.

It is not easy to obtain equality in education. To believe that measures taken only at school would achieve equality is to close one's eyes very firmly to reality. Since families differ very much from one another when it comes to scholastic interest, possession of books, cultural habits etc and since some families to a greater extent than others stimulate their children intellectually, a total equality in education can be reached only when we have destroyed the family, changed the economic system and introduced collective education and training. But the question is: Do we actually want such a change in order to reach a total equality?

Needs - adult education

According to the American psychologist Maslow certain basic needs must be fulfilled before the individual can proceed to satisfy more advanced needs. Maslow's model which usually is called the staircase of needs is reproduced below.



According to Maslow's model the two first steps must be passed before adult education can be successfully attempted. Maslow's model is static and I would like to argue that the individual is probably able to begin with adult education even if he has not advanced that far on the staircase of needs. The essential thing is however

that adult education is not provided in isolation but that it is included in a social program which also intends to improve economic and social conditions

The socioeconomic obstacles

In a society with great socioeconomic differences there will also be great differences in educational consumption. Just as the economic resources are granted those who have a higher socioeconomic status, those who are already well-educated will get the largest portion of the available educational resources. This distribution of resources takes place according to automatic mechanisms and a political awareness and activity will be required in order to bring about a change.

The socioeconomic obstacles are inherent in the demographic and social structure.

Examples of such obstacles are provided in the table below.

Supply of adult education	Lack of adult education
densely populated area	←→ thinly populated area
industry	←→ agriculture
high average income	←→ low average income
political consciousness	←→ lack of interest in politics
assembly halls for common activities	←→ lack of assembly halls for common activities
low average age	←→ high average age
relativism	←→ dogmatism
periphery - multiple alternatives	←→ centre - few alternatives
democratic rule	←→ authoritarian rule
ownership - distributed	←→ ownership - concentrated

In order to reduce the socioeconomic obstacles to adult education various measures are required. The underlining of various depends on the fact that in cases where people invested in only one measure, very bad results were obtained. If e.g. teachers are trained for adult education and buildings and material are provided, this is no guarantee in itself that the educational level will be raised. If there is a lack of scholastic motivation no students will show up for the teaching no matter how proficient teachers and luxurious premises. In previous chapters I have discussed the concept of welfare. In this context I would like to return to that. If we want to reach a higher educational attainment level the "welfare" must be improved. This means that standard of living as well as quality of life must increase.

A program of measures concerns both society, the macrolevel, and the individual, the microlevel. Examples of measures will be reproduced below.

Measures on macrolevel

- .. improve housing
- .. procure employment
- .. improve public health
- .. create a consciousness of adult education in politicians and other decision-makers

Measures on a microlevel

- .. create an individual consciousness of the importance of education
- .. provide information on the structure of society
- .. make the individual conscious of his own possibilities to change his conditions

Where is one supposed to begin? Provided that society - the state - the rulers - have a positive attitude towards adult education as well as a wish to invest material resources, the measures should first be taken on a microlevel. The importance of the individual's own actions can be illustrated in the following quotation taken from Julius Nyerere.

".. People cannot be developed; they can only develop themselves. For while it is possible for an outsider to build a man's house, an outsider cannot give the man pride and selfconfidence in himself as a human being. Those things a man has to create in himself by his own actions. He develops himself by what he does; he develops himself by making his own decisions, by increasing his understanding of what he is doing, and why; by increasing his own knowledge and ability, and by his own full participation --as an equal-- in the life of the community he lives in." (14)

Research and development work

As social and economic conditions are entirely decisive for the opportunities to provide adult education, it is of utmost importance to study the socioeconomic structure. In Portugal the regions have very varied socioeconomic structures. These regions ought to be studied very closely. For the time being (January 1978) there is a project being drawn up with the aim of mapping different parts of socioeconomic structure in the Minho district. The collection of data will be carried out in two ways:

1. Statistical description and analysis
2. Interview studies

1. Statistical description and analysis

From a data bank with statistical information a number of variables are selected which are supposed to be of importance to adult education. Such variables are e.g.:

- a. Population
Number, age distribution, density of population
- b. Trade and commerce
Employment in industry, agriculture and services
- c. Education
Number of schools, teachers. The proportion of illiterates
- d. Economy
Average income, investments, costs for education
- e. Political activities
Political affiliation, polling

Analyses will be carried out on the basis of these data, with the aim of finding out what variables are of particular importance for adult education.

2. Interview studies

A number of individuals /places/ are selected and studied by means of personal interviews. The primary purpose is to investigate knowledge and consciousness of adult education. Another purpose with these interview studies is to create opportunities for a future educational program in which the participants themselves are supposed to be active (participatory research).

If the methods to be used in the Minho district turn out to be efficient, the socioeconomic mapping should be extended to include all of Portugal. In order to create a national program for adult education in Portugal it is, in my view, necessary to know the socioeconomic structure in the country.

Things to discuss

1. Discuss the concept of socioeconomy according to the given definitions.
2. To what extent is the concept of welfare dependent on the political structure in the country?
3. Discuss the meaning of the concept equality
4. Which are the greatest socioeconomic obstacles for adult education in the Minho district?
5. What questions concerning socioeconomic conditions ought to be asked in an interview study, the purpose of which is to map out the conditions for adult education?

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The Portugal-project
Document No. I

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THE PORTUGAL PROJECT

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Paper for the course

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mars 1978

Document no. I

Introduction

Society disposes of a certain amount of human and material resources. How these resources are to be used depends on how we choose to answer the following questions.

1. How large a proportion of all our social resources are to be invested in education?
2. How are the resources invested in education to be distributed among the members of society?
3. How are the resources invested in education to be used, in what way and with which content?

In order to answer these questions, economic and social criteria may be used (1). I will return to these criteria further on.

Is it possible to formulate general objectives for adult education? From a distributive point of view the following general objectives may be stated:

1. Adult education ought to diminish the gaps in education in society. Thus it will further an increased equality and social justice.
2. Adult education ought to create opportunities for the continued existence and further development of democracy. It is supposed to increase the social and cultural consciousness of the citizen and thus create an understanding of and an active contribution to social change.
3. Adult education should effectively contribute to the furthering of progress in economy. Adult education should thus provide the labour market with a well educated labour as well as contribute to full employment.
4. On a long-term-basis adult education should work for a fair distribution of economic and social resources. Adult education is a prerequisite of a new international economic order (2).

In the objects described above economic and social components are included. These components are interrelated in one direction; that is a high social standard presupposes a high economic standard. On the other hand a high economic standard does not necessarily provide a high social standard.

Economics of education

The concept of economics of education signifies that education is viewed in relation to the profits in national economy directly or indirectly yielded by education. Educational policy is supposed to be based on economic premisses with cost estimates for profit or loss performed with respect to the results. Most industrial countries do not invest in adult education unless they are sure to get fairly prompt dividends in the form of increased productiveness which will lead to an increased gross national product. Thus all education is governed by social claims and ideologies and to a very minor extent by the needs of the individual. Of course, it is not easy to distinguish between individual and social needs. By the way the needs of society are hammered home with the aid

of all the communicative facilities of an industrial society, the individual is influenced to adopt an ideology which actually is not his but rather that of society. The individual's own potential needs for education may be satisfied only when they coincide with those of society. This state of affairs is not necessarily a disadvantage. It implies that society directs its resources towards political and economic goals which may at the same time favour the individual. (3)

The reasoning above which is based on a so-called cost-benefit-analysis has great limitations. If the costs for a product are related to its practical use or to its effect we have to work with quantities possible to describe in figures. If we want to describe adult education in terms of values like democracy, justice and equality, the cost-benefit-analysis will be of no use. In basic economy four productive factors may be included in a cost-benefit-analysis, namely natural resources, labour, real capital, and know-how. Even if there is a high correlation between the gross national product and the educational level in a country, this does not necessarily imply that the planning of education should follow the mechanical laws applied in a cost-benefit-analysis. The relationship between the applicability and the cost-benefit-analysis in the planning of education is such, that the further developed educational system a country has, the less applicable are the cost-benefit-techniques. (4)

In order further to explain this relationship I want to discuss two concepts within educational technology, namely the demand-for-places approach and the need-of-manpower approach. According to the former, the intake of students, that is the individual demand-for-places, determines the framing of the educational system. According to the latter approach, the dimensioning of the educational system is primarily based on social needs (e.g. those of the labour market). As it is difficult to predict the fluctuations in the labour market, especially according to the second approach, educational forecasts tend to be slightly misleading. It may seem contradictory, but in spite of sophisticated methods like computational technology, it will be easier to predict the need for education in a developing country on a comparatively primitive basis. To this must be added the complicated interplay of political values in which equality claims must be matched with purely utilitarian claims.

Examples of the relationship between education and economy

In order to illustrate the relationship between education and economy from an international point of view I would like to render a chapter from a book on the distributional problems of education written by me in 1977. (5)

The great losers

UNESCO publishes a statistical yearbook in which the actual state of education and culture are described in cold figures. I have looked through two of those printed in 1974 and 1975 respectively. (6)

At the moment of writing we have arrived at 1977 and thus I ought to have used the most recent statistical information. Unfortunately I have not been able to obtain any yearbook printed in 1976 or 1977. At the National Library of Psychology and Education they do not know of any yearbook being published after the edition from 1975. Be that as it may. The state of the world has not changed for the better with respect to education and culture so the information I will provide in the following will, with all the reservations usually holding for statistics, yield a reasonably accurate picture of the world education at the end of the seventies. To the extent that changes have taken place since 1974, when the information of the UNESCO yearbook was gathered, the changes have been in a negative direction.

As the whole world has obtained a lower standard of living in 1975 according to the statistics of the World Bank (published in December 1976), it might seem illogical if education and culture have developed in the opposite direction (i.e. compared to the economic development).

The economists of the World Bank were able to state that the welfare, expressed in terms of gross national product i.e. the total value of goods and services for the world's most indigent countries is still the same as in 1970. There has not been any improvement for these countries. 26 states displayed a gross national product per capita of less than 880 crowns. Corresponding figures for the United States and Sweden are 31 000 and 34 700 Sw crowns respectively.

The most indigent countries of the earth are, according to the statistics of the World Bank, Bhutan (300 Sw crowns/capita), The Upper Volta, Mali and Ruanda (all with 400 Sw crowns/capita), and Somalia, Ethiopia, Burundi and Bangladesh (440-480 Sw crowns/capita).

In my study of linguistic ability in various social groups presented in 1975 (7) I referred to winners and losers in the closing chapter. In that context the linguistic usage was correct. From an international point of view the concepts of winner and loser have quite a different meaning. The ultimate losers will be the indigent countries of the earth. The gap between poor and rich has widened during the last years which as far as education is concerned implies that while another thousand Sw crowns could be invested in a student each year in this country, the Upper Volta must cut down the contributions to each student with ten crowns, because of famine and drought, to a standard which in fact means that they do not have any money at all for the basic training.

Growth of population and educational opportunities

Education costs money. It is a trivial statement but nevertheless true. In countries where there is a high proportion of children and young people, the costs per capita will be greater than in industrial countries where this proportion is low. In industrial countries there is a very low growth of population and a low proportion of children and young people while the opposite is the case in the developing countries. In the table below changes in growth of population are shown totally and in the age groups 0 - 24 years for industrial and developing countries.

Thus we have now arrived at the conclusion a) that the proportion of children and young people is higher in the developing countries and b) that the proportion increases more in developing countries than in industrial countries. This state of affairs leads to a difficult economic charge on the developing countries. To register the costs for education and relate them to some dimension like gross national product is a very difficult thing. UNESCO tried to do this tour de force in their educational statistics.

Increase or decrease in population in percentage terms during the years 1970-1975

All age groups	Industrial countries	Developing countries
All age groups	1.0	2.5
0 - 4 years	1.6	2.1
5 - 9 years	-0.5	3.0
10 - 14 years	0.1	1.7
15 - 19 years	0.7	2.5
20 - 24 years	1.5	3.2

(8)

Now, these figures might easily be deceptive as states with centralized government or a planned economy will report a lower proportion of the gross national product invested in education than states with mixed economy or a Capitalist system. To reduce this deception somewhat, I would like to describe, by means of a table below how education actually charges the social economy in different countries. The quota used, has been calculated according to the following formula:

$$\text{The quota of charge} = \frac{\text{the costs for education expressed in percentage of gross national product}}{\text{costs for education expressed in percentage of public (national, federal and/or local) expenses}}$$

The higher the quota the higher the charge on national economy. This quota is obviously a rough estimate but it may still serve as an illustration of the relation between economic charge and education.

With the reservations I made before as for the accuracy of the figures, the trend is quite clear. The education in Ethiopia charges society three times more than in Sweden. In Sweden all children go to elementary school. In Ethiopia slightly more than 40 per cent of all children go to primary school (the equivalent to our lower level). The number of pupils on higher levels in Ethiopia (which in this context will represent the indigent countries) is lower than 25 per cent.

Economic charge and the extent of basic education in a number of wealthy and a number of indigent countries

Territory	Quota of charge
Indigent countries:	
Ethiopia	7.0
Egypt	4.0
Senegal	4.1
Tunisia	4.0
Peru	5.3
India	6.7
Nepal	10.5

Territory	Quota of charge
Wealthy countries:	
Sweden	2.0
England	2.3
Norway	2.1
Soviet	1.8
U.S.A.	2.5

Note: the figures are taken from the years 1965-1972

The number of illiterates on the earth increases both in a relative and in an absolute sense. This is happening while education in countries like Sweden, the U S and Western Germany costs between 6000 and 20 000 Sw crowns per student and year. On the whole, the costs for education require an increasingly large share of the gross national product in industrial as well as in developing countries. But the overall economic charge on the developing countries will be many times greater than in the industrial countries.

Describing the educational problems of the developing countries is simple if we want to pile up facts which all unambiguously show how the industrial countries can keep or increase their high educational standard while the developing countries will have to invest an increasingly large portion of the economic total resources in order at least to keep the educational attainment level at the level of 1970.

The relationship between educational attainment level and living standard is quite clear. In the sixties Friedrich Edding (who works with international education at the Max Planck Institute in Berlin) made a study of the relationship between gross national product per head of population and the number of school years in a great number of countries. The correlation was almost complete ($r=0.9$).

According to Husén (9) the results may be interpreted in at least three different ways. (i) High education contributes to increased welfare, that is a high gross national product. (ii) A high gross national product provides opportunities for an advanced educational system. (iii) Both education attainment level and gross national product are due to underlying and more complicated factors like political system and ideological foundations.

At the end of the sixties the economist Philip H Coombs wrote his book *The World Educational Crisis* (10). Coombs was able to show in statistic figures how the gap between rich and poor countries was widening and how badly planned education was in general. Coombs' book served as an alarm clock and educationists all over the Western World discussed the causes of the crisis and made proposals for solutions. Coombs' discussion of possible solutions is, however, of little relevance today, ten years later. During the sixties it was possible to confine a problem, like Coombs did, to concern only education. But with this confinement the number of variables, needed to be manipulated, was comparatively limited and possible solutions could be drawn up - solutions which were all based upon technical innovations or technical aids.

Educational satellites were supposed to circle over Africa and transmit programs for millions of illiterate people. Teaching machines were to reduce the costs for teacher's salary. A strong control of the educational system in order to create an equilibrium between input and output was also expected to contribute to the solution of the crisis.

Now, ten years later, we know that there are no such simple solutions. The global education cannot be solved by means of particular measures. Education is part of the major problems connected with the economic and social distribution of the total resources of the world.

Peru and Czechoslovakia, Denmark and Guatemala. A few comparisons.

My way of trying to keep in touch with the reader may seem unsophisticated. In the colporteur literature of the nineteenth century there was an animated dialogue between reader and author. I can see that I tend to adopt that style. I must ask for the reader's indulgence but it so happens that when I write I have a partner in front of me - a partner making comments, finding faults, giving tips and asking questions. I write this now for the reason that the preceding chapter became too much for me. It became too much not because there was a lack of documentation. On the contrary, the documentation on education is rich. No, I rather felt that it was too much either to have to support my arguments about uneven distribution and exploitation with a great number of figures or else start out from the premise that facts are known and instead formulate analyses - perhaps in terms of slogans. And then there is always the risk that my words will not penetrate.

Having been a teacher for almost twentyfive years, I have learnt that an educational message must be strictly defined and exemplified if it is to be trustworthy. I thus believe that a few comparisons of educational standard in four countries representing different economic levels and different political systems may illustrate the global injustice in education better than any universal surveys.

I have chosen to compare the industrial countries Denmark and Czechoslovakia with the very much poorer Guatemala in Central America and Peru in South America.

The countries thus matched together have approximately the same population, which is the reason why I have selected those very four.

The four countries represent different political and economic systems. Denmark is a democracy of western design with a so-called mixed economy. Czechoslovakia has a state-controlled planned economy. Peru is since a few years governed by a military junta with a Socialist strain. The principles of the economic system of Peru are not well defined. Both Communism and Capitalism are fought. In Peru the Socialism is called "desarrolismo" (evolutionism). Guatemala has a Capitalist economic system where multinational enterprises and the United States are important interested parties. According to Western democratic nomenclature the four countries are to be found on a scale ranging from democratic pluralism (Denmark) to a corrupt totalitarian state (Guatemala). The two couples Peru-Czechoslovakia and Guatemala-Denmark are different from each other in all respects except that there are in each couple the same number of persons to educate.

In the following table with characteristic features for the two couples there are figures illustrating the great difference between industrial and developing countries.

In the survey below a variety of facts concerning the two couples is provided

	Peru	Czecho- slovakia	Guatemala	Denmark
Population ¹	14,9 milj	14,6 milj	5,5 milj	5,1 milj
GNP in US \$ ¹ (100)	7 960 439	52 063 043	1 893 090	22 872 300
GNP/capita ¹ in US \$	534	3571	351	4551
Total expenditure ¹ on educ in US \$ (1000)	326 378	2 394 900	41 648	1 601 061
Expenditure/capita ¹ on education	23	164	8	319
Proportion of illit- erates aged 25 years	43 % ²	0.6 ³	69 ⁴	5
Students at colleges and universities	138 935 ⁶	127 957 ⁶	19 408 ⁶	96 408 ⁶
Students pro 1000 inhabitants	9.5	8.8	3.6	19.3
Students pro teachers	11.6	6.3	15.7	9.2
Expenditure for Research & Development in US \$ (100)	25 443 ⁷	2 222 079 ⁸	243 ⁹	1 169 962 ⁷
Expenditure for R&D pro inhabitant in US \$	1.70 ⁷	152.70 ⁸	0.05 ⁹	33.82 ⁷
Paper consumption per ¹⁰ inhabitant (kilogram), annually	1.8	11.2	0.7	24.5
Bookproduction. Number of titles, annually	943 ¹¹	8567 ¹¹	166 ¹²	6500 ¹¹

Notes: 1. 1972; 2. 1961; 3. 1970; 4. 1964; 5. Figures missing
6. 1972; 7. 1970; 8. 1973; 9. 1972; 10. 1973; 11. 1973; 12. 1972;

And yet the developing countries do not belong to the most indigent countries but belong in economic respects to the lower middle class of the world.

Similarly neither Denmark nor Czechoslovakia belong to the richest countries in the world. Denmark is numbered among the fifteen richest countries of the world and Czechoslovakia belongs to our lower upper class in economic respects.

The figures of the table show quantitative facts. On the other hand we know nothing of the quality of the education. The figures only reveal to some extent, the distribution of resources. It may thus seem impressive with the great number of students in Peru. Seeing what high a proportion of the adult population is illiterate one realizes that the educational resources are unevenly distributed.

Making some allowance for all the possible inaccuracies in the statistical material which is taken from UNESCO for each nation respectively, the table, however, shows the enormous gap in education between rich and poor countries. The table illustrates the thesis "education is for the wealthy".

Portugal - economy - education

The conditions of Portugal, with respect to the variables displayed in the table of datas in the preceding chapter, will be reported below. Like all statistical reports it suffers from great shortcomings. The statistics date from different years. Practically all statistical information in the Statistical Yearbook 1975 dates back to a time just before the revolution in 1974.

Economy - education. Portugal

Population	8.74 milj (1974)
GNP in US \$ (00)	11 820 346
GNP/capita in US \$	1352
Total expenditure on education	6 101 954 (000) escudo 248 227 (000) US \$
Expenditure on education pro inhabitant	698 Escudo 28 US \$
Proportion of illiterates 1) aged 25 years	Figure missing
Students at colleges and universities	59 845 (1973)
Students pro 1000 inhabitants	6.8 (1973)
Students pro teachers	14.2 (1973)
Expenditure for Research & development in US \$	347 468 (00)
Expenditure for R&D pro inhabitant in US \$	3.9
Paper consumption pro inhabitant (kilogram), annually	4.3 kilogram
Bookproduction. Number of titles, annually	7 326 (1974)

1) According to information given by under-secretary of State in Ministry of education (Sept 1977) the proportion of illiterates of the adult population is about 30 %

What is socioeconomy?

The concept of economy may be defined in quantitative terms as gross national product average income etc. The concept socioeconomy contains, apart from economic values, values which concern the welfare or the social position of the individual.

In recent research the concept socioeconomy has often been replaced by welfare. The Finnish sociologist Allardt (11) makes use of a system of concepts where he distinguishes between living standard and quality of life. The model is illustrated in the fourfold table below.

	Welfare	Happiness
Standard of living	1. Needs, the satisfaction of which is defined in terms of material resources	3. Subjective sensations and experiences of one's material conditions of living
Quality of life	2. Needs, the satisfaction of which is defined in terms of relations to people, to society and to nature	4. Subjective sensations and experiences of relations to people, society and nature

The three dimensions of welfare are described in terms of

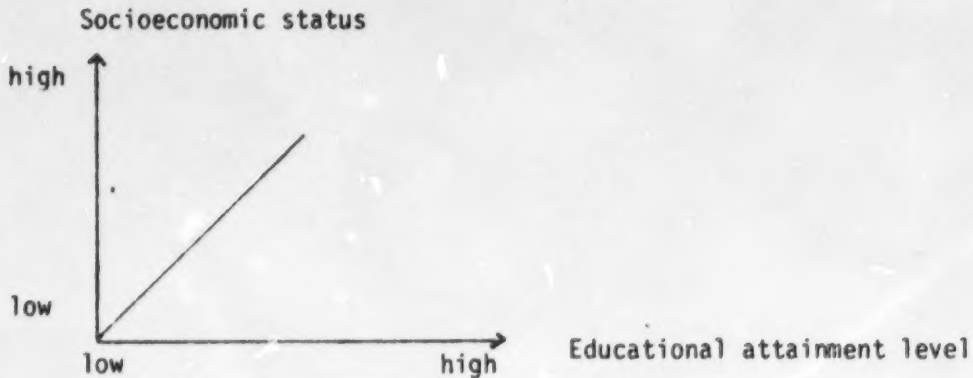
.. having
.. loving
.. being

The concepts include a variety of components described below

<u>Having</u>	.. Income .. Housing standard .. Employment .. Education .. Health	} Standard of living
<u>Loving</u>	.. Local solidarity .. Family ties .. Ties of friendship	
<u>Being</u>	.. Reputation .. Political resources .. Personal status	} Quality of life

The elements included in the standard of living are strongly correlated (e.g. income/housing standard/education). The relations between standard of living and quality of life are not unambiguous.

The traditional socioeconomic grouping in classes or groups contains a variety of shortcomings. The concept social class is connected with political and economic conditions like political power and ownership to or disposition of the means of production. The concept social group has primarily been defined in terms of education and economy in Western Europe and the United States. Social class or social group should, in my opinion, be used only when the concepts are clearly defined and when the different social classes or groups have clear characteristics. Irrespective of whether we use the concept of welfare or the division into social groups we will find a simple and unambiguous correlation between socioeconomic status and educational attainment level which is shown in the figure below.



The figure above describes the relationship between education and socioeconomy. It does not, however, tell which is the dependent and which is the independent variable. The interaction between education and socioeconomy can be illustrated by the following questions:

- (i) Does a good education provide a high socioeconomic status?
- (ii) Does a high socioeconomic status provide a good education?

It is impossible to answer these questions unambiguously. But as education as well as socioeconomic status depend on the social distribution of resources, the primary task in order to improve adult education in a country is to transfer money and know-how to the groups who are worst off. Unless the aspect of distribution is considered, the existing differences in socioeconomy and education will increase rather than decrease.

The prerequisites for adult education to work in a politically distributive way (that is to create a more equal society with respect to economic and social resources) are:

Adult education must get to those who lack education or have a bad education

The effects of adult education must be such that those who have a low socioeconomic status will get a higher one

The theses above are absolute. One of the most serious problems within adult education has been that the wrong people have benefitted from the investments in education. The second problem has concerned the content of adult education. Unless adult education provides knowledge that can be used to improve conditions of life, the prevailing relations of power will be reproduced.

Adult education is one of many instruments to achieve a greater degree of quality in society. Equality in opportunities is an expression frequently used after the second world war in the discussion on educational policy. The English historian Towney has compared it to "the impudent politeness of an invitation to unwelcome guests issued in full assurance that the guests will be prevented by circumstances to accept".

The concept of equality may be conceived in different ways, due to which political ideology we represent.

The Conservative view implies that one believes in genetic rule. This means that each human being has innate negative and positive features which will develop with a deterministic relentlessness. In the typical Conservative view it is implicit that each human being should be satisfied with his/her fate and that the poor actually have got what they deserve. Hardly any Conservative party ventures to launch this view openly. They prefer to talk about that "the talents must be attended to" and that "school must not become equal to the extent that the students who are doing well will be handicapped". The more modest Conservatives use other phrases.

The Conservative view on equality is based upon the type of theory which Arthur Jensen, (12) among others, tries to defend, namely that man is governed by genetic factors and the influence of the environment is inconsiderable. (See the preceding chapter.)

The purely Liberal view on equality proceeds from the idea that school should be equal for all individuals and that social obstacles should be cleared away. Each individual should be treated equally. The idea of equality in education can be traced back to the Period of Enlightenment with Rousseau as one of its foremost instigators. In the Declaration of Independence of the United States from 1776, equal rights to education are also declared. The Liberal conception based upon equality for everyone when starting one's education, has a certain likeness with the views held in Conservative circles. If the student does not succeed now when he has got the opportunities, the school is no longer to blame but it is his own fault.

The Liberal idea of equality has many variations. The modern Swedish variation is based upon the doctrine that equality at school can be obtained by providing as much support and help as possible to students who are socially and economically deprived. On the other hand, Liberalism does not approve of too strong a control from the state to achieve this equality.

The Social Democratic view on equality in education agrees to some extent with the Liberal view. However, their conception is that society should interfere and direct us towards increased equality. This can take place by means of allocation of quotas to higher education (so that the working class will get a more equitable representation) or by measures outside of school.

The greatest difference between the Marxist Revolutionary view and the Social Democratic view on equality in education is that the Social Democrats, by continuous reforms, and gradually, in a long term process, want to reach the same goal as that which the Socialist revolutionaries want to achieve quickly.

The deepest gap between the Social Democrat and the Revolutionary view on equality lies in their different premisses. The Revolutionary Socialists do not consider that equality can be obtained in a society with a Capitalist or mixed economy structure.

In his recently published book on equality and education Torsten Husén has focused on an interesting aspect of the problem of equality. Husén's question is whether the efforts to obtain equality in the Swedish school system may contribute to an increased meritocracy and thus increase the gulf between winners and losers in the long run.

The argumentation is the following. Since we know that school achievements are strongly correlated to home variables and since school is norm related, (that is: school looks more to relative than to absolute competence), this will contribute to increase individual differences in school achievement.

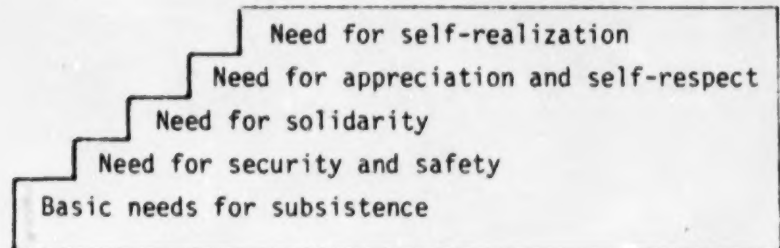
Inequality is, as it were, inherent in the system. In Daniel Bell's study of the postindustrial society similar apprehensions are brought forward. (13) The apparent zeal to create equality from the start of school while still maintaining mechanisms which create inequality in the educational system will according to Bell, result in a pronounced meritocracy.

Bell has, among other things, found out that Communist states like Soviet and Eastern Germany have a socially biased recruitment to higher education. This bias does not have the same cause as the biased recruitment in Western Europe but rather is connected with meritocratic criteria.

It is not easy to obtain equality in education. To believe that measures taken only at school would achieve equality is to close one's eyes very firmly to reality. Since families differ very much from one another when it comes to scholastic interest, possession of books, cultural habits etc and since some families to a greater extent than others stimulate their children intellectually, a total equality in education can be reached only when we have destroyed the family, changed the economic system and introduced collective education and training. But the question is: Do we actually want such a change in order to reach a total equality?

Needs - adult education

According to the American psychologist Maslow certain basic needs must be fulfilled before the individual can proceed to satisfy more advanced needs. Maslow's model which usually is called the staircase of needs is reproduced below.



According to Maslow's model the two first steps must be passed before adult education can be successfully attempted. Maslow's model is static and I would like to argue that the individual is probably able to begin with adult education even if he has not advanced that far on the staircase of needs. The essential thing is however

that adult education is not provided in isolation but that it is included in a social program which also intends to improve economic and social conditions

The socioeconomic obstacles

In a society with great socioeconomic differences there will also be great differences in educational consumption. Just as the economic resources are granted those who have a higher socioeconomic status, those who are already well-educated will get the largest portion of the available educational resources. This distribution of resources takes place according to automatic mechanisms and a political awareness and activity will be required in order to bring about a change.

The socioeconomic obstacles are inherent in the demographic and social structure.

Examples of such obstacles are provided in the table below.

Supply of adult education	Lack of adult education
densely populated area	←→ thinly populated area
industry	←→ agriculture
high average income	←→ low average income
political consciousness	←→ lack of interest in politics
assembly halls for common activities	←→ lack of assembly halls for common activities
low average age	←→ high average age
relativism	←→ dogmatism
periphery - multiple alternatives	←→ centre - few alternatives
democratic rule	←→ authoritarian rule
ownership - distributed	←→ ownership - concentrated

In order to reduce the socioeconomic obstacles to adult education various measures are required. The underlining of various depends on the fact that in cases where people invested in only one measure, very bad results were obtained. If e.g. teachers are trained for adult education and buildings and material are provided, this is no guarantee in itself that the educational level will be raised. If there is a lack of scholastic motivation no students will show up for the teaching no matter how proficient teachers and luxurious premises. In previous chapters I have discussed the concept of welfare. In this context I would like to return to that. If we want to reach a higher educational attainment level the "welfare" must be improved. This means that standard of living as well as quality of life must increase.

A program of measures concerns both society, the macrolevel, and the individual, the microlevel. Examples of measures will be reproduced below.

Measures on macrolevel

- .. improve housing
- .. procure employment
- .. improve public health
- .. create a consciousness of adult education in politicians and other decision-makers

Measures on a microlevel

- .. create an individual consciousness of the importance of education
- .. provide information on the structure of society
- .. make the individual conscious of his own possibilities to change his conditions

Where is one supposed to begin? Provided that society - the state - the rulers - have a positive attitude towards adult education as well as a wish to invest material resources, the measures should first be taken on a microlevel. The importance of the individual's own actions can be illustrated in the following quotation taken from Julius Nyerere.

".. People cannot be developed; they can only develop themselves. For while it is possible for an outsider to build a man's house, an outsider cannot give the man pride and selfconfidence in himself as a human being. Those things a man has to create in himself by his own actions. He develops himself by what he does; he develops himself by making his own decisions, by increasing his understanding of what he is doing, and why; by increasing his own knowledge and ability, and by his own full participation --as an equal-- in the life of the community he lives in." (14)

Research and development work

As social and economic conditions are entirely decisive for the opportunities to provide adult education, it is of utmost importance to study the socioeconomic structure. In Portugal the regions have very varied socioeconomic structures. These regions ought to be studied very closely. For the time being (January 1978) there is a project being drawn up with the aim of mapping different parts of socioeconomic structure in the Minho district. The collection of data will be carried out in two ways:

1. Statistical description and analysis
2. Interview studies

1. Statistical description and analysis

From a data bank with statistical information a number of variables are selected which are supposed to be of importance to adult education. Such variables are e.g.:

- a. Population
Number, age distribution, density of population
- b. Trade and commerce
Employment in industry, agriculture and services
- c. Education
Number of schools, teachers. The proportion of illiterates
- d. Economy
Average income, investments, costs for education
- e. Political activities
Political affiliation, polling

Analyses will be carried out on the basis of these data, with the aim of finding out what variables are of particular importance for adult education.

2. Interview studies

A number of individuals /places/ are selected and studied by means of personal interviews. The primary purpose is to investigate knowledge and consciousness of adult education. Another purpose with these interview studies is to create opportunities for a future educational program in which the participants themselves are supposed to be active (participatory research).

If the methods to be used in the Minho district turn out to be efficient, the socioeconomic mapping should be extended to include all of Portugal. In order to create a national program for adult education in Portugal it is, in my view, necessary to know the socioeconomic structure in the country.

Things to discuss

1. Discuss the concept of socioeconomy according to the given definitions.
2. To what extent is the concept of welfare dependent on the political structure in the country?
3. Discuss the meaning of the concept equality
4. Which are the greatest socioeconomic obstacles for adult education in the Minho district?
5. What questions concerning socioeconomic conditions ought to be asked in an interview study, the purpose of which is to map out the conditions for adult education?

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